BEACON
HR & payroll

Monthly BST Sponsor Meeting
October 24, 2006
10 am – 11 am

ATTENDEES

Margaret Wiggins, AOC	Bennie Aiken, DCCPS	Jim Newman, DOI
Tammie Hicks, DOI	Pam Frazier, ITS	Philip Price, DPI
Rick Stone, DCR	Bruce Garner, SOS	Trisch Amend, NCHFA
Margaret Bode, NC Lottery	Alan Sanders, DOJ	Denise Sessoms, Commerce
Tracy Little, DOC	Steve Ghabel, DOT	Kathy Gruer, DHHS
Gwen Canady, OSC	John Stephenson, Agriculture	Pam Wortham, Treasurer
Keith McCombs, DOR	Mark Paxton, DOT	Herb Henderson, DOT
Stephanie King, DOT	Earlene Hicks, SHP	Anne Lasley, ESC
Cecilia Edgar, Wildlife	McKinley Wooten, DOA	John Eley, DJJDP
Ed McBride, NCSSM	Brenda Warburton, OSP	Lowell Magee, BEACON
Tom Legare, BEACON	Tyler Jones, BEACON	Libby Williams, BEACON
Chris Loso, BEACON	Jill Denning, BEACON	Edward Brodsky, BEACON

AGENDA ITEMS

Project Update and Scope Definition – Lowell Magee

- Wave 2 Design Sessions are being conducted; started October 19 and last through October 31
- Ending activities for Blueprint Phase aimed for December 22; we are currently on target
- The scope for the BEACON HR/Payroll project has been determined. Functions in scope include:
    - Personnel Administration – full functionality
    - Organizational Management – full functionality
    - Time Management – time and attendance – CATS
    - Benefits Administration – supports benefits administration for statewide plans
    - Payroll – full functionality
    - SAP Portal – ESS/MSS functionality (via internet and intranet)
    - Finance/Controls – organizational setup
    - Reporting – business intelligence and SAP reports
- Two main functions that are out of scope for this phase are: Training and Events Management and E-recruitment. May be implemented as concurrent projects – TBD.
- Other items out of scope include:
    - Personnel development
    - Personnel cost planning
    - Career and succession planning
    - Compensation management
    - Employee health and safety

- The BEACON HR/Payroll Project Team has purchased a software package that will support tax deductions in every state, which is not the case now; can only support North Carolina taxes.
- Information about the rollout schedule should be available before the next meeting; we will send it out as soon as it is decided.

Change/Workforce Transition Agents Update – Libby Williams

- The Change/Workforce Transition (WFT) Agent kickoff meeting will take place in December – date TBD
- Role-mapping will take place in January – this is a key activity
- Primary responsibilities for Change/WFT Agents include:
    - Role descriptions and mappings
    - Job design and descriptions
    - Organizational design
    - Workforce transition strategy and plan
- Key attributes for the Change/WFT Agent include:
    - Experience in conducting HR activities within agency
    - The person should have the authority to leverage others within the agency to create, review, and validate WFT planning documentation
    - Identify agency-specific policies and procedures that may need to be modified
    - Facilitate communications between agency and BEACON Team
    - Change/WFT Agent should expect to spend a great deal of time working on the project, especially beginning in mid-2007
- If the person listed as the Change/WFT Agent for your agency is not correct, please send changes to Libby Williams at Libby.Williams@ncosc.net.

Communications Update – Tyler Jones

- The inaugural Communications Agent meeting was held on October 11
- Activities included:
    - Delivered communications toolkit
    - Overview of website
    - Discussed roles and responsibilities
    - Explained communications scorecard
    - Made sure everyone was excited about their role
- BEACON Project website updated
    - Among other pertinent information, the password-protected site will contain BST presentation materials, workshop documentation, brochures, and posters
    - User name: **hr_payroll**, Password: **hrpyrbpt**
- Currently making arrangements for one-on-one meetings with Communication Agents at their respective agencies

Upcoming Project Activities – Edward Brodsky

- Wave 2 sessions began October 19 and will wrap up October 31
- What is needed from Sponsors:
    - Coordinate with your Team Lead to verify agency participation
    - Communicate project information to agency leadership

    - Provide BEACON Communications Team with any upcoming forums or meetings you would like them to attend
    - Examine BST Scorecard information on BEACON website to determine areas needing to be addressed

- What you can expect from BEACON Team:
    - Update website on weekly basis
    - Update on the deployment plan
    - Communicate stakeholder analysis findings
    - Provide feedback and updates from the Wave 2 design sessions
    - Schedule of on-boarding workshop for the Change/WFT Agents

Upcoming Meetings

- Tuesday, November 28 (10-11 am)
- Tuesday, December 19 (10-11 am)
- Tuesday, January 30, 2007 (10-11 am)
- Tuesday, February 27, 2007 (10-11 am)
- Tuesday, March 27, 2007 (10-11 am)
- Tuesday, April 24, 2007 (10-11 am)

BEACON HR/Payroll Project Change/Communications Team Contacts

- Change/Communications Lead = Edward Brodsky – edward.brodsky@ncosc.net, 919-431-6520
- Communications Lead = Tyler Jones – tyler.jones@ncosc.net, 919-431-6523
- Change/WFT Lead = Libby Williams – libby.williams@ncosc.net, 919-431-6623

BST SPONSOR QUESTIONS AND ANSWERS

If our agency practices "negative" time entry, does that mean we do not have to worry much about the time management functionality?

To some extent, this is true. What negative time entry will focus on is tracking exceptions. Exceptions that affect vacation days and sick leave balances will still be tracked. Exceptions that affect pay (e.g. overtime hours) will also have to be tracked.

It will be an issue for my agency if holidays are not in the system – we have people who work 24/7. What can we do?

Holidays will need to be tracked if there are exceptions. For example, if an employee chooses to delay taking a holiday, that needs to be tracked as two exceptions (one to get credit for working the holiday, the other to identify the actual day the leave was taken).

If agencies are interested in switching to a positive time capture system instead of a negative system, please contact Lowell Magee. Please send an e-mail to Lowell Magee at Lowell.Magee@ncosc.net noting your needs and we will do our best to accommodate them.

If my agency does change to a positive pay system, we know there will be a transition period and we are concerned about employees waiting for pay. Are they able to receive a loan or advance?

This issue has been investigated and the answer is yes, they would be able to execute advance pay and pay it back over a period of a year. This topic can be discussed further if an agency is interested.

If there are gaps between SAP and the legacy functionality, how will those be documented and filled?

Analysis of such gaps are documented as part of the Wave 2 Design Sessions. We need to make sure that all of our processes are documented correctly and agencies need to approve these process flows. If any agency feels strongly that a functional area is not being appropriately addressed, please contact Lowell Magee at Lowell.Magee@ncosc.net. It is critical that you highlight your concerns because the Blueprinting Phase of the project will be completed by December 22, 2006.

Will grievance tracking be in the system?

Yes. Grievance tracking will be a basic part of the system as it is today, but SAP's full functionality for grievance tracking is not in scope at this time.

Concerning benefits functionality, how will an agency's benefit "exceptions" differ from the standard state benefits?

There will be a paper process for capturing the benefits exceptions, and they will be entered into the system and appear automatically as deductions on an employee's paycheck.

Will garnishments be handled in a standard manner?

Yes. The Standardization Advisory Committee (SAC) has recommended that the garnishments process be managed statewide; however, the details on how this will happen still need to be worked out.

Will there still be a pilot phase of the project?

While it is not officially called a pilot, agencies will test the new system during the Realization Phase of the project. As part of this testing strategy, we will simulate the payroll cycle three times from October through December 2007.

When will training take place?

In general, training for users will take place 10 weeks before their agencies go live on the BEACON HR/Payroll system. Therefore, training for core users will take place within the November – December 2007 timeframe for agencies that are involved with the January 2008 rollout. We are also looking at implementing a broad-based training program for agency users working at numerous locations across the state.

How can we conduct workforce transition planning activities before we know how the processes are going to change?

Workforce transition planning will encompass time-intensive activities that build as we obtain more information about what functions will change within each agency. We will start our workforce transition activities in early 2007 with role mapping exercises which will lead to the identification of change impact and workforce transition plan development with our preparation for go-live in late summer – fall 2007. Agencies should start planning ahead to ensure resources will be available to assist with these activities.

Were the Wave 2 and 3 Design Sessions combined?

Yes. There will no longer be a separate Wave 3 Design Session schedule.